Results

1992 Twenty-Fifth Annual Survey of Corporate Relocation Policies

Atlas Van Lines
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25TH ANNUAL SURVEY OF CORPORATE RELOCATION POLICIES

With American businesses paying more than twenty billion dollars a year for moving costs, it's becoming more important than ever to learn as much as possible about what it takes to relocate employees. And that's precisely what the *Atlas Survey of Corporate Relocation Policies* has been doing for twenty-five years.

In the early years of this study, a written relocation policy was not "policy" at 37% of the responding companies (1970 *Atlas Survey*). Twenty-one years later, only 4.3% have no written relocation policy—and 42.7% have had a relocation policy for 16 years or more.

While the *Survey's* questions and format have evolved since 1968, and other corporate relocation surveys have come and gone, the *Atlas Survey* has remained the authoritative source for information on relocation policies.

Over the last three years, relocation policies have encountered more concerns from employees. Employee concerns over the cost of living in the new location have gone from 47.5% in 1989, to 53.8% in 1990, to 56.3% in 1991. Housing and mortgage concerns have gone from 34.7%, to 41.3%, 43.0%. And spouse's employment has gone from 41.4%, to 44.9%, to 50.0% in 1991.

Dual-career families and their impact on employee relocations were first discussed in the *Atlas Survey* in 1977. And while it's not surprising to note that more women employees are being transferred, as illustrated in "A," the trend that parallels this statistic is especially interesting. Illustration "B" shows that the number of companies offering no assistance to a trailing spouse is declining, while the number of companies that will find outside employment for the trailing spouse is increasing. No trend is identifiable for companies that pay the trailing spouse's full or partial salary until hired, or hire the trailing spouse within the company.

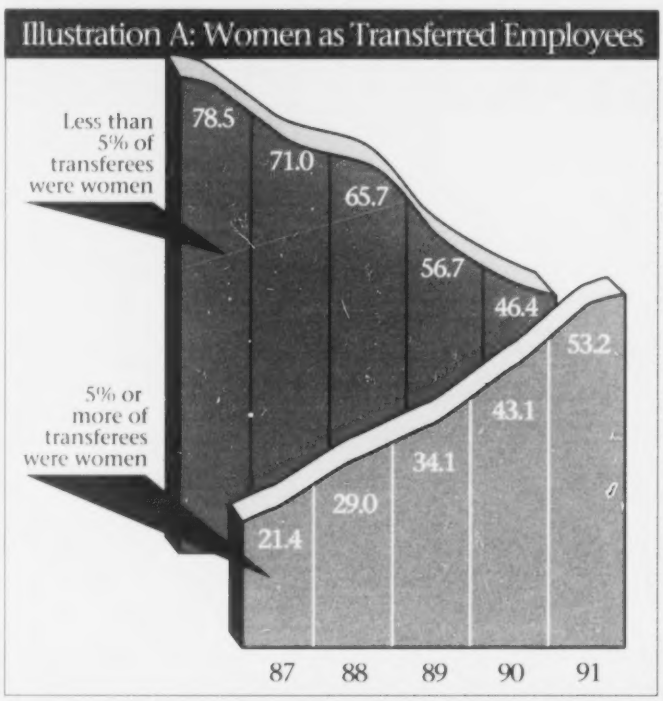
New questions in this year's *Survey* concerning the trailing spouse indicate that 21.0% of the companies said that 5-20% of their transferred employees' trailing spouses were husbands. When asked about the trailing spouses that were wives, 61.9% of the respondents indicated 51% or more of their trailing spouses were wives.

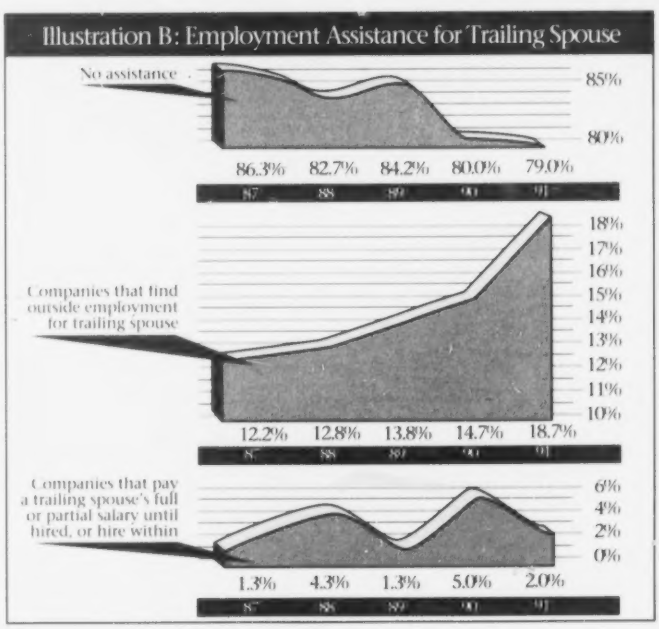
Illustration A

The percentage of companies where women were less than 5% of employee relocations has dropped dramatically from more than three-fourths in 1987 to less than half in 1991.

Illustration B

The trailing spouse in an employee relocation is receiving more attention from the relocating employee's company. Over the past four years, job assistance for the trailing spouse has increased from 13.5% to 20.7%

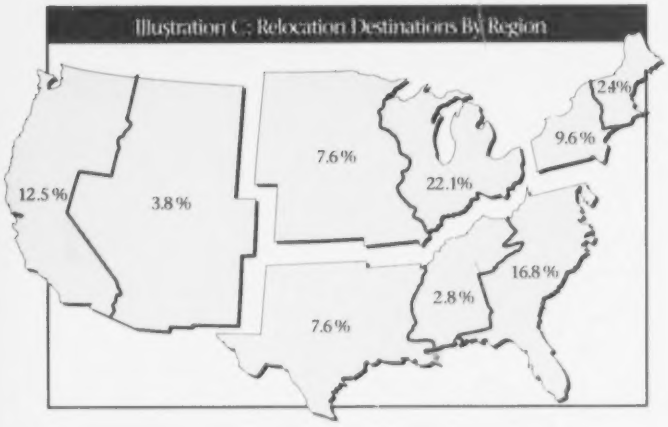




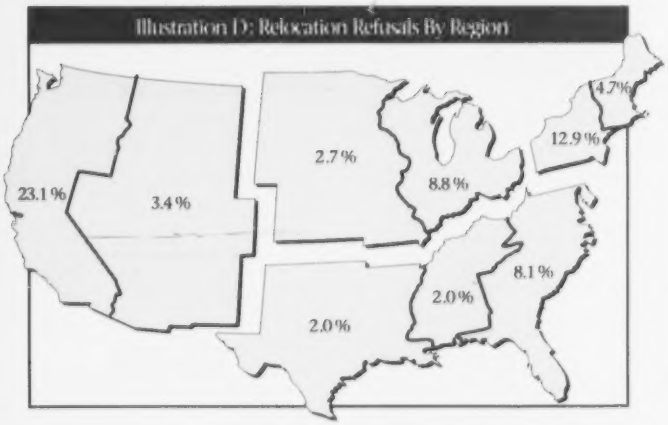
Illustrations "C" and "D" show where the majority of employees were relocated during 1991, and to where they declined to be relocated. While these regions of the continental U.S. are useful for illustrative purposes, there are certain states that belie the trends for their regions. Therefore, state-by-state traffic flow statistics need to be considered when interpreting this information.

As an example, when the state-by-state traffic statistics are considered, California has been a net outbound state (more household goods shipments leaving than arriving) for the past two years for the first time. The three states receiving approximately 25% of California's outbound shipments are Washington, Texas and Arizona.

The *Survey* respondents indicated that the majority of their employees in 1991 were moved to the north east states (22.1%), with the south atlantic (16.8%) coming in second. Conversely, the pacific states were declined as a destination by 23.1% of the respondents' employees while the middle atlantic states received refusals to relocate by 12.9% of the respondents' employees.



Illustrations C & D
"C" depicts by region where the responding companies were relocating the majority of their employees in 1991. For example, 22.1% of the companies said that most of their employees were moved to north east central states. "D" shows the destination regions receiving the majority of refusals to relocate.



During 1991, the majority of corporate relocation policies had been in effect over 20 years (32.9%) and were administered from a centralized department (79.1%). More than half (52.0%) of the responding companies were international. Manufacturing/processing accounted for 55.3% of the business classifications. The number of salaried employes ranged from 1,000 to 4,999 in 27.6% of the companies and 40.0% had approximate annual sales over $1 billion.

Beginning with this, the silver anniversary of the *Relocation Policy Survey*, the questionnaire was also sent to Canadian-based businesses. Included in this year's results are responses from 50 Canadian companies.

Overall, there were 280 companies participating in the *Survey* this year. The people completing the questionnaires for those companies had been in their current position for more than six years (49.4%) and were mostly from either human resources (55.3%) or traffic/transportation (23.0%).

Atlas wishes to express its thanks to each of the corporate relocation people who took the time to fill out the questionnaire that makes this research possible.

The *Twenty-Fifth Survey of Corporate Relocation Policies* is made available at no charge from the Atlas Van Lines Public Relations Department. For additional information, please contact:

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25TH ANNUAL SURVEY OF CORPORATE RELOCATION POLICIES

conducted by

ATLAS VAN LINES, INC.

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Survey questions indicated either by, "Check each applicable response," or by, "(circle appropriate response to each question)," will have percentage totals exceeding 100%.

PART A -- Corporate Profile

1. Which one of the following classifications most accurately describes your company?

55.3% - Manufacturing/processing
28.2% - Service (includes education, health care, etc.)
13.3% - Financial (includes banking, insurance, investments, etc.)
02.9% - Government/military

2. In terms of operations, is your company . . . ?

16.4% - Regional
31.0% - National
52.5% - International

3. Your company's approximate annual sales for 1991 were . . .

17.8% - Less than $100 million
13.4% - $100-$249 million
13.4% - $250-$499 million
08.2% - $500-$749 million
06.9% - $750 million-$1 billion
40.0% - Over $1 billion

4. How many salaried (that is, non-hourly) people are employed by your company?

05.5% - Less than 100
10.7% - 100-249
13.2% - 250-499
18.0% - 500-999
27.6% - 1,000-4,999
24.7% - 5,000 or more

5. How long has your company had a formal relocation policy?

04.3% - No formal policy
00.0% - Less than 1 year
11.7% - 1-5 years
20.5% - 6-10 years
20.5% - 11-15 years
09.8% - 16-20 years
32.9% - Over 20 years

6. Does your company administer employee relocations from a centralized department or are relocations administered on a decentralized (regional, local office) basis?

79.1% - Centralized
20.8% - Decentralized

7. If you answered "Centralized" to question A-6, does your company's centralized relocation department (circle appropriate response to each question) . . .

43.9% - Control air carrier selection?
62.6% - Control freight carrier selection?
93.4% - Control household goods carrier selection?
45.7% - Handle office relocations?
21.0% - Recommend site and space selection for office relocations?
35.9% - Handle air travel via commercial airlines?

8. If you answered "Decentralized" to question A-6, who selects the carrier for your employee's move?

44.4% - The company
03.7% - The employee
38.8% - The company and the employee together
01.8% - A relocation firm
11.1% - Other

9. Which category best represents the function of your department?

55.3% - Human Resources/Personnel
23.0% - Traffic/Transportation
05.2% - Administration
04.4% - Compensation and Benefits
05.2% - Relocation Services
06.6% - Other

10. What is your position with the company?

00.3% - President
06.7% - Vice-President
00.7% - Assistant Vice-President
12.4% - Director
35.0% - Manager
03.3% - Department Head
12.0% - Supervisor
29.0% - Other

11. Are you . . . ?

52.7% - Male
47.2% - Female

12. How many people are in your department?

42.5% - Less than 5 full-time people
24.7% - 5-9 full-time people
15.2% - 10-14 full-time people
04.7% - 15-19 full-time people
03.6% - 20-24 full-time people
09.0% - 25 or more full-time people

13. How many years have you held your current position?

06.5% - Less than 1 year
13.8% - 1-2 years
30.1% - 3-5 years
22.5% - 6-10 years
26.9% - Over 10 years

14. Which publications do you regularly read? (check each applicable response)

21.4% - *Distribution*
29.3% - *Human Resource Executive*
26.1% - *Mobility*
37.6% - *HR Magazine*
21.0% - *Traffic Management*
17.8% - *Traffic World*
13.8% - *National Relocation and Real Estate*
11.1% - *Transport Topics*
19.4% - *Transportation and Distribution*
05.1% - *The Financial Post*
09.5% - *The Globe and Mail*
03.9% - *American Mover*
06.3% - *Human Resources Professional (Canadian)*
07.1% - *HR Focus*
28.5% - *Personnel Journal*
02.3% - *Innovations in Relocation Management*
03.1% - *Relocation Journal*
07.9% - *Relocation Quarterly*
13.0% - Other

15. To what relocation-related associations do you currently belong?

57.0% - E-R-C (U.S.)
20.3% - C-E-R-C (Canada)
08.5% - Industrial Traffic League
28.9% - Other

16. Approximately how many employee relocations, within the U.S., was your company responsible for in 1991?

32.4% - 0-9
08.9% - 10-19
14.1% - 20-49
11.9% - 50-99
11.5% - 100-199
07.4% - 200-299
02.6% - 300-399
10.8% - 400 or more

17. Approximately how many employee relocations, within Canada, was your company responsible for in 1991?

78.3% - 0-9
08.3% - 10-19
05.0% - 20-49
02.9% - 50-99
01.6% - 100-199
01.6% - 200-299
01.6% - 300-399
00.4% - 400 or more

18. What is the age range of your company's most frequently transferred salaried employee?

01.5% - Less than 25 years
11.1% - 25-30
31.7% - 31-35
42.8% - 36-40
11.9% - 41-45
00.7% - More than 45 years

19. What is the salary range of your company's most frequently transferred employee?

02.8% - Less than $30,000
18.7% - $30,000-$39,999
34.2% - $40,000-$49,999
28.5% - $50,000-$59,999
05.3% - $60,000-$69,999
10.2% - $70,000 and higher

20. How frequently is your "average" transferee relocated?

09.5% - Every two years or more often
52.1% - Once every three to five years
14.9% - Once every six to ten years
23.3% - Less frequently than once every ten years

21. In 1991, what percentage of your transferred employees were women?

20.7% - None
25.7% - Less than 5%
17.6% - 5%-10%
15.0% - 11%-20%
10.3% - 21%-30%
05.0% - 31%-40%
03.8% - 41%-50%
01.5% - 51% or more

22. In 1991, what percentage of your relocations involved a trailing spouse that was a husband?

33.5% - None
37.8% - Less than 5%
15.2% - 5%-10%
05.8% - 11%-20%
03.5% - 21%-30%
02.3% - 31%-40%
00.3% - 41%-50%
01.1% - 51% or more

23. In 1991, what percentage of your relocations involved a trailing spouse that was a wife?

05.1% - None
03.1% - Less than 5%
03.5% - 5%-10%
02.3% - 11%-20%
07.1% - 21%-30%
07.1% - 31%-40%
09.5% - 41%-50%
61.9% - 51% or more

24. Comparing the number of employee transfers in 1991 with 1990, the 1991 number . . .

06.5% - Increased greatly
24.6% - Increased moderately
12.3% - Decreased greatly
26.0% - Decreased moderately
30.4% - Remained about the same

25. Compared to 1991, do you anticipate that the number of employees your company will move during 1992 will . . . ?

28.5% - Increase
25.9% - Decrease
45.4% - Remain about the same

26. Compared to 1991, do you estimate that your company's number of relocations in 1995 will be . . . ?

59.6% - More
40.3% - Less

27. If your number of employee transfers changed from 1990 to 1991, what external conditions had the most significant impact on that number? (check each applicable response)

47.5% - Economic conditions
37.5% - Growth of company
13.9% - Lack of qualified people locally
02.1% - Growth of domestic competition
06.5% - Growth of international competition
09.6% - External conditions had no impact
11.3% - Other

28. What internal company conditions affected the change in the number of employee transfers from 1990 to 1991? (check each applicable response)

07.4% - Increased production
11.2% - Decreased production
12.4% - Expansion of facility
17.8% - Closing of facility
27.8% - Budget constraints
17.8% - Expansion into new territories
19.5% - Acquisitions/mergers
38.5% - Corporate reorganization
33.1% - Promotions/resignations
07.8% - International expansion
03.7% - Internal conditions had no impact
06.2% - Other

29. Does your company allow the hiring of spouses of employees?

14.9% - No
64.9% - Yes, but not in the same department/division
03.6% - Yes, but not at the same location
16.4% - Yes, without restriction

PART B -- Corporate Relocation Policies

1. How is information about your company's employee relocation policy made known to your employees?

19.4% - Employee is provided printed material describing all procedures and conditions
63.5% - Employee is provided printed material describing company policies, and this information is also explained by authorized personnel within the company
05.0% - Pre-move counseling is provided within the company
11.0% - There is no set policy--each case is handled individually and explained on a one-to-one basis
00.0% - Professional counseling is provided by a relocation firm
00.8% - Other

2. How did your corporate relocation policy change during 1991?

78.1% - Did not change
15.3% - Created a more liberal policy
06.5% - Created a more limited policy

3. To what extent does your company reimburse for moving expenses?

77.6% - Full reimbursement of moving expenses
05.7% - Partial reimbursement based on salary, position, tenure, etc.
00.0% - No reimbursement of moving expenses
16.6% - A combination of a,b, and/or c

4. Does your company's moving policy allow more benefits for new hires or for transferees? (circle appropriate response to each question) . . .

01.8% - New hires
62.2% - Transferees
35.8% - No difference

5. Does your company reimburse/pay the relocating employee (circle appropriate response to each question) . . .

90.1% - To move an automobile?
61.0% - To move a second automobile?
28.3% - To move a boat?
45.8% - To have belongings picked up from a secondary residence (summer home, relative's home, etc.)?
08.7% - To hire temporary maid service at either the old or new residence?
96.0% - To pack all items?
68.7% - To move unlimited weight?
39.2% - To have permanent/extended storage of some possessions?
60.3% - To move collections of highly valuable objects like statuary, paintings and antiques?
42.5% - To move pets?
71.6% - To move recreation and lawn equipment?
30.9% - To move satellite dishes?
85.4% - To carry items down from an attic?

6. How many expense-paid trips does your company allow an employee to find housing in the new location?

01.8% - None
38.5% - One
51.1% - Two
07.4% - Three
01.1% - Four or more

7. How many days are allowed for a house-hunting trip?

10.9% - 1-2
33.7% - 3-4
26.1% - 5-6
21.9% - 7-9
03.7% - 10-14
03.4% - Other

8. How many expense-paid house-hunting trips is the spouse allowed?

05.7% - None
44.6% - One
43.5% - Two
04.9% - Three
01.1% - Four or more

9. How does your company assist an employee's spouse in finding employment in the new location?

79.0% - No assistance
07.7% - Pay job-finder's fee
02.0% - Find employment within the company
11.0% - Find employment outside the company
00.0% - Pay spouse's full or partial salary until hired

10. Which of the following practices does your company authorize for the buying or selling of an employee's home (circle appropriate response to each question) . . .

09.6% - Pay none of the selling costs?
13.9% - Pay only the real estate commission?
68.9% - Pay all fees connected with the purchase or sale of the house (lawyer, title, land, surveys, etc.)?
44.1% - Guarantee a sale price for the employee's former residence?
46.5% - Actually purchase the employee's former residence?
75.1% - Pay a lease-termination penalty?
00.3% - Assist in the sale of a vacation home?
10.4% - Offer no assistance in the new location?
46.8% - Assist with the arrangement of a mortgage or swing loan?
34.8% - Pay a cash bonus?
43.4% - Offer a mortgage-interest differential?
33.7% - Offer a cost-of-living differential?

11. If your company will buy an employee's former residence, how do you determine the sale price?

81.6% - Pay the average of several appraisals
03.1% - Pay the employee's appraised value
00.6% - Negotiate with the employee
00.0% - Pay the employee's asking price
08.2% - Arrange with a national realtor to act on behalf of the company and the employee
06.3% - Other

12. During 1991, what was the average cost to your company per domestic move for . . .

$ 6,096 - Direct moving services (van line packing and transportation)?
$ 4,036 - Indirect moving services (motel accomodations, family transportation, meals, maid service, appliance servicing, spousal counseling, and similiar items)?

13. The total moving cost (total of costs from B-12 plus real estate services) is what percentage of your company's total cost of relocating an employee?

06.0% - Less than 10%
15.4% - 11%-25%
12.7% - 26%-49%
15.4% - 50%-74%
16.5% - 75%-84%
33.7% - 85% or more

14. What protection coverage does your company authorize for the transportation of the household goods?

16.0% - A released rate of 60¢ per pound per article
13.6% - Declared value protection (depreciation value)
70.4% - Full replacement value protection

15. Who is the provider of transit protection for relocating employees' goods?

75.3% - Van line
09.9% - Outside insurance company
13.8% - Company is self-insured
00.7% - Employee provides

16. How frequently is an employee's relocation affected by the employment status of that employee's spouse?

05.0% - Almost always
23.5% - Frequently
57.8% - Seldom
13.7% - Never

17. Did at least one of your employees decline the opportunity to relocate during 1989?

68.0% - Yes
31.9% - No

18. If you answered "Yes" to question B-17, did the number of employees declining relocation in 1991 . . . ?

20.6% - Increase from the 1990 level
07.5% - Decrease from the 1990 level
71.8% - Remain about the same as the 1990 level

19. If you answered "Yes" to question B-17, what reasons did the employees give for declining relocation? (Check each applicable response.)

56.3% - Cost of living in the new location
52.5% - Family ties
43.0% - Housing/mortgage concerns
50.0% - Spouse's employment
34.8% - No desire to move
27.8% - Personal
03.1% - Other

20. The majority of your employees relocated in and/or to the U.S. in 1991 were moved to which region?

12.5% - Pacific (A)
03.8% - Mountain (B)
07.6% - North West Central (C)
22.1% - North East Central (D)
09.6% - Middle Atlantic (E)
02.4% - New England (F)
07.6% - South West Central (G)
02.8% - South East Central (H)
16.8% - South Atlantic (I)
14.4% - No relocations offered to/within the U.S. during 1991

21. Which region of the U.S. was most often declined for relocation by your employees during 1991?

23.1% - Pacific (A)
03.4% - Mountain (B)
02.7% - North West Central (C)
08.8% - North East Central (D)
12.9% - Middle Atlantic (E)
04.7% - New England (F)
02.0% - South West Central (G)
02.0% - South East Central (H)
08.1% - South Atlantic (I)
31.9% - No relocations declined to/within the U.S. during 1991

22. The majority of your employees relocated in and/or to Canada in 1991 were moved to which province/territory?

10.6% - Alberta
03.7% - British Columbia
00.5% - Manitoba
00.0% - New Brunswick
00.0% - Newfoundland
01.0% - Nova Scotia
23.9% - Ontario
00.0% - Prince Edward Island
04.2% - Quebec
00.5% - Saskatchewan
00.0% - Northwest Territories
00.0% - Yukon Territory
55.3% - No relocations offered to/within Canada during 1991

23. Which province/territory of Canada was most often declined for relocation by your employees during 1991?

02.0% - Alberta
02.0% - British Columbia
01.3% - Manitoba
00.6% - New Brunswick
00.0% - Newfoundland
00.6% - Nova Scotia
08.2% - Ontario
00.6% - Prince Edward Island
03.4% - Quebec
02.0% - Saskatchewan
00.0% - Northwest Territories
02.7% - Yukon Territory
76.0% - No relocations declined to/within Canada during 1991

24. Does declining the opportunity to relocate usually hinder an employee's career?

39.5% - Yes
60.4% - No

25. Which category of your company's work force is most likely to experience the greatest number of relocations?

42.4% - Sales
18.5% - Plant/facility management
18.1% - Engineering
01.3% - Data processing
08.8% - Administration
03.0% - Research and development
02.6% - Finance
04.8% - Marketing

26. Rank the following in terms of relocation activity ("1" for the busiest period, through "4" for the least busy period).

4 - December 1990 - February 1991
2 - March 1991 - May 1991
1 - June 1991 - August 1991
3 - September 1991 - November 1991

PART C -- Transportation

1. With how many carriers does your company have contractual agreements for the transportation of household goods?

13.5% - None
20.1% - One carrier
24.5% - Two carriers
16.4% - Three carriers
06.5% - Four carriers
18.6% - Five or more carriers

2. Does your company have contractual agreements for the transportation/handling of . . .? (Check each applicable response.)

36.9% - Products
23.5% - Exhibits
84.3% - Employee relocations
27.6% - General commodities
38.4% - Computers and/or office equipment

3. If your company entered into a contract carriage agreement during 1991, what was the primary reason?

56.8% - Did not enter into a contract carriage agreement (skip to C-6)
18.4% - Cost
16.3% - Service
02.1% - Reliability
00.0% - Claims processing
02.6% - Value added services
03.6% - Other

4. Of these carriers under contract, does your company specify which carriers are preferred?

64.2% - Yes
35.7% - No

5. In terms of evaluation, what has been your company's experience with such contract carriage arrangements?

50.8% - Excellent
47.4% - Good
01.7% - Fair
00.0% - Poor

6. **Did your company use the services of a relocation service or a brokerage firm in 1991; and if so, which services did it provide? (Check each applicable response)**

50.3% - Did not use a relocation service or brokerage firm in 1991
16.2% - Counseling about the planning and details of moving
09.5% - Counseling about company policy
44.0% - Real estate sale and purchase
20.6% - Orientation tours in the new location
09.5% - Arrangement of family's transportation and accommodations
13.8% - Contact of household goods moving company
12.3% - Audit and/or payment of invoice
06.7% - Monitoring of shipment
06.7% - Assistance with employee claims preparation and submission
06.7% - Supplementary services (appliances, cleaning, etc.)

7. **Would your company consider "one-stop shopping" as a means of securing all of its needed relocation services? That is, would you obtain — through a single source — real estate services, transportation services, counseling services, and so on?**

26.5% - Yes
73.4% - No

8. **Rank the following in terms of carrier selection ("1" for the most important, through "5" for the least important).**

1 - Service
2 - Price
3 - Reputation
4 - Local Agent(s)
5 - Claims processing

9. **Rank the following in terms of carrier evaluation ("1" for the most important, through "6" for the least important).**

1 - Service
2 - Employee feedback
3 - Price
4 - On-time delivery
5 - Claims processing
6 - Extra services

10. **From your relocating employees' perspectives, rank the following parts or aspects of a move in terms of importance ("1" for the most important, through "5" for the least important).**

3 - Salesperson/origin agent
1 - Packer
2 - Driver
5 - Destination agent
4 - Claim processing in the event of loss or damage

11. **When comparing the van line service you received in 1991 to that received in 1990, would you say that van line service in 1991 was. . .?**

25.4% - Better than 1990
02.2% - Worse than 1990
72.2% - About the same as 1990

12. **Which of the following does your company utilize? (check each applicable response)**

28.5% - Electronic transfer of funds to your carrier for relocation costs
47.6% - On-line registration access with your carrier
33.3% - On-line access with your carrier for shipment records/history

13. **Regarding cross-border relocation, your company, during 1991, relocated employees cross-border to (check each applicable response) . . .**

24.4% - Canada
20.4% - U.S.
10.0% - Mexico
65.4% - No cross-border relocations (skip to C-16)

14. Regarding cross-border relocation, does your company relocate cross-border through a (check each applicable response) . . .

12.2% - Relocation company
11.2% - Forwarder
07.1% - Broker
78.5% - Household goods carrier
05.1% - Other

15. Rank the following for cross-border carrier selection ("1" for the most important, through "5" for the least important).

1 - Service
2 - Price
3 - Scheduling
4 - Reputation
5 - Third party

PART D -- International Relocations

(TO BE COMPLETED ONLY IF YOUR COMPANY PERFORMED ANY INTERNATIONAL RELOCATIONS DURING 1991)

1. Approximately how many international employee relocations was your company responsible for in 1991?

55.6% - 0-9
11.3% - 10-19
14.4% - 20-49
08.2% - 50-99
04.1% - 100-199
06.1% - More than 200

2. Compared to 1991, do you estimate the number of employees your company will relocate internationally during 1992 will . . .?

31.9% - Increase
17.5% - Decrease
50.5% - Remain about the same

3. Which is your primary contact for international relocations?

18.8% - Van line
45.5% - Van line agent
31.1% - International forwarder
03.3% - Third party
01.1% - Other

4. Rank the following for international carrier selection ("1" for the most important, through "4" for the least important).

1 - Service
2 - Price
4 - Third party
3 - Reputation

5. Rank the following guidelines for international carrier evaluation ("1" for the most important, through "6" for the least important).

1 - Service
2 - Employee feedback
5 - Claims processing
4 - Price
3 - On-time delivery
6 - Extra services

6. Does your company utilize Electronic Data Interchange (EDI) interface capabilities on international shipments?

89.7% - Never
07.9% - Seldom
02.2% - Frequently
00.0% - Always

7. Apart from the physical handling of personal belongings, do you believe that the International Household Goods Forwarding Industry provides sufficient service in these areas of the relocation process (circle appropriate response to each area). . .

52.6% - Visa and document services?
28.0% - Schooling and education?
36.8% - Auto rentals/leases?
01.7% - Other?
40.3% - Travel services?
33.3% - Cultural indoctrination?
31.5% - Legal and financial indoctrination?